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Foreign Crops and MARKETS



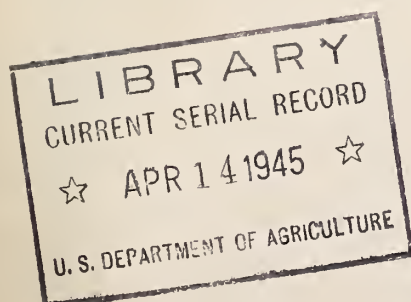
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APRIL 2, 1945



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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

WORLD GRAIN STOCKS CONTINUE TO DECLINE

Grain stocks on hand on January 1 in the principal exporting countries totaled slightly less than a year earlier, according to information available in the Office of Foreign Agricultural Relations. Stocks of small grains, however, especially of wheat and rye, were considerably smaller than at the beginning of 1944. The decrease in small grains was largely offset by an increase in stocks of corn, in both the United States and Argentina.

GRAINS: Estimated stocks in the principal exporting countries, January 1, 1944 and 1945

ITEM	WHEAT	RYE	BARLEY	OATS	CORN	TOTAL
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	1,000 short tons
United States						
1944	818	43	218	753	2,021	99,612
1945	835	27	213	801	2,203	105,418
Canada						
1944	692	14	181	427	a/	32,328
1945	608	8	140	395	a/	28,144
Argentina						
1944	443	17	35	68	25	16,394
1945	340	16	35	86	150	17,064
Australia						
1944	253	a/	8	23	4	8,262
1945	109	a/	6	11	3	3,674
Total						
1944	2,206	74	442	1,271	2,050	156,596
1945	1,892	51	394	1,293	2,356	154,300

Compiled from official sources.

a/ Stocks from the small production considered to be negligible.

Considering total tonnage of all grains, January 1 stocks in the United States and in Argentina were somewhat above their 1944 level. The more favorable position in these two countries is due mainly to the increases in the estimated corn supply on that date. Canada and Australia show about equal quantitative declines in their stocks of all grains. Canada's stock position was reduced as the result of heavy export and feeding programs. Stocks in Australia were only about 45 percent of their last year's level, as the result of heavy drought damage to the wheat crop and the high level of wheat exports during the past year.

It should be noted that stocks on January 1 do not represent exportable surpluses. Domestic requirements account for the principal difference. In the case of Southern Hemisphere countries, the stocks include grain from the recently harvested small-grain crops, whereas in the Northern Hemisphere countries, the amount that may be

considered as exportable surplus will be affected by crop prospects for the coming harvest. This is also true with regard to the Argentine corn crop now being harvested. Despite the larger stocks on January 1, the prospective exportable supply of corn from that country in 1945 is expected to be sharply reduced, compared with last year's surplus, as a result of extensive drought damage.

Stocks of wheat in the four exporting countries are estimated at about 1,892 million bushels, or about 15 percent less than a year earlier. The exportable surplus from that total is indicated to be around 750-800 million bushels, or more than indicated requirements of international trade during 1945. In addition, the 1945 crops in Canada and the United States will become available during the season. The largest surplus on January 1 was in Canada, where it is estimated at around 375-400 million bushels. The physical difficulty of moving the grain

into position for export, however, may be expected to limit somewhat the amount actually available for export. Surpluses in the United States and Argentina are each placed at around 200 million bushels, while Australia will have virtually no surplus during the current year.

Rye stocks in the four countries are considerably below the 1944 figure, with the indicated surplus for export much reduced, as a result of the small harvest in Argentina and heavy disappearance last year in the United States. New crops to be harvested in North America will be a factor affecting the export position during the second half of the season.

Barley stocks are estimated to be about 90 percent of the 1944 total, with the bulk of the decrease showing in Canadian stocks. The reduction in supplies in Canada is attributed to a moderate decrease in the 1944 production and to above-average exports. Most of the present barley surplus available for export is in Argentina, where surpluses from the carry-over and new crop are placed at around 20-25 million bushels. The 1945 crop outturn in Canada will largely determine the surplus position of that country.

Stocks of oats in January were slightly larger than a year ago, mainly as the result of an increase in the United States supplies. Stocks in Canada, in contrast, are somewhat smaller than in 1944 but are still large

enough that a considerable quantity can be considered available for export. The 1944 oats crop in Argentina was estimated to be somewhat larger than the production a year ago. Trade sources, however, indicate that the recently harvested crop may have been over-estimated, and the stocks on January 1, and especially the surplus, may be reduced below present estimates.

Estimated corn stocks on January 1 were considerably above stocks on that date a year ago, when they were reduced by the very short crop of 1943 in Argentina. The outlook for exportable supplies in 1945, however, appears somewhat less favorable than a year ago due to another reduced crop now being harvested in Argentina. Surpluses in Argentina will be determined, in large part, by the availability of other fuels. If corn is not used for fuel, estimates of the surplus are from around 120 to 150 million bushels. If, on the other hand, solid fuels are not available and corn is again burned extensively, the entire supply may be required for the country's needs.

Supplies of corn in the United States on January 1, though some 180 million bushels more than a year earlier, include a large quantity of high-moisture grain that is, at present, unsuitable for export. Only limited shipments are being made.

Gordon P. Boals
Judith Edwards Downey

FRENCH NORTH AFRICAN OLIVE-OIL PRODUCTION LARGEST SINCE OUTBREAK OF WAR

The mid-season preliminary estimate places the 1944-45 edible olive-oil production in French North Africa, i.e., Algeria, Morocco, and Tunisia, at 109,300 short tons compared with 64,700 tons in 1943-44 and 85,800 tons the preceding season. At this level the combined production for those three countries would be the second largest during the past 15 years, being exceeded only by the record production of 1939-40 and by the previous high of 1929-30. The current estimate exceeds the 5-year (1938-39 to 1942-43) average by 56 percent and the 10-year (1933-34 to 1942-43) average by 46 percent.

The largest crop of olives on record was produced in Tunisia this season. In Algeria, however, it was about average, while in Morocco it was the poorest in many years. The cultivation of olive trees and production of olive oil have constituted a major industry in Tunisia for many years. The industry there is well-organized and functions remarkably well. In Algeria and

Morocco, on the other hand, there appears to be room for a considerable amount of expansion and improvement in the interest of rounding out the agricultural economy of those countries.

The 1944-45 marketing season started with a carry-over only in Tunisia. That carry-over was estimated at 7,400 short tons and was being held as a reserve against

domestic consumption. In Algeria and Morocco no carry-over was reported in legal commercial channels, though it was possible to find an occasional small lot in black markets. The shortage of edible oils in these two countries was acute, and with below-normal production of olive oil, considerable substitution and importation of oils will have to be made this season.

As the situation stands at mid-season, Tunisia is the only Mediterranean Basin country with a fair potential exportable surplus of olive oil, a large portion of which will go to France, Algeria, and Morocco. Spain, the largest producer of edible olive oil in the world, is expected to produce only half as much as in the previous season, which would be insufficient to take care of domestic needs. The situation in Portugal is similar to that of Spain. Most of the other producing countries will require practically all of their production for domestic consumption.

FRENCH NORTH AFRICA: Edible olive-oil
production (revised), 1944-45
with comparisons

CROP YEAR	ALGERIA	MOROCCO	TUNISIA	TOTAL
	Short tons	Short tons	Short tons	Short tons
Average -				
1938-39 to:	:	:	:	:
1942-43 ..	16,700:	12,700:	40,800:	70,200
1933-34 to:	:	:	:	:
1942-43 ..	16,000:	11,400:	47,400:	74,800
1939-40	25,000:	13,200:	77,000:	115,200
1940-41	10,300:	19,800:	17,600:	47,700
1941-42	20,600:	10,600:	26,700:	57,900
1942-43	17,600:	13,200:	55,000:	85,800
1943-44 a/ ..	20,900:	5,300:	38,500:	64,700
1944-45 a/ ..	16,500:	2,800:	90,000:	109,300

From consular reports based on official North African data. Most of above estimates represent revisions made on basis of data supplied by French authorities. This series replaces all former data for the years specified.

a/ Preliminary. b/ Revised.

The 1944-45 preliminary estimate of edible olive-oil production in Algeria is 16,500 short tons, compared with 20,900 tons in 1943-44. The estimate indicates about an average production compared with both the 5-year (1938-39 to 1942-43) and the 10-year

(1933-34 to 1942-43) averages. Earlier reports had indicated a much lower production, but as harvesting drew to a close it was found that the crop was larger than at first thought. These data represent "commercialized" oil only. An unknown quantity of oil is produced annually by natives and never enters legal commercial channels.

While important in the country's economy, olive trees have been more or less neglected in Algeria for several centuries. With the shortage of other edible oils and curtailed imports because of the war, however, interest is being revived, especially by French colonists. It is estimated that pre-war domestic consumption of all edible oils averaged about 66,000 short tons, only a small part of which represented Algerian olive oil. A heavy percentage of the requirements of edible oil was imported from other countries; namely, Tunisian olive oil and West African peanut oil.

The Algerian olive acreage is about 64 percent owned by natives and 36 percent by European colonists. Reports indicate that the acreage in European hands is generally better cared for and gives somewhat higher yields. The average oil content of Algerian olives is reported to be about 14 percent, which is lower than that in Tunisia. There are about 2,000 mechanical presses and an estimated 4,000 hand or crude presses. The latter are mostly in native ownership. Considering the limited production of oil, storage facilities are ample.

The small production of olive oil this season, together with shortages of other oils, has left no exportable surplus. On the contrary, it has necessitated heavy importation of oil from Tunisia and other sources. Even if a possible bumper olive crop were harvested in 1945-46, it is doubtful whether oil would be available for export, unless the deficiency were made up by heavy imports of oil from other sources.

The French Moroccan olive-oil production for the 1944-45 season is now estimated at only 2,800 short tons, compared with 5,300 tons in 1943-44. This preliminary estimate represents only 22 percent of the 5-year (1938-39 to 1942-43) average and 25 percent of the 10-year (1933-34 to 1942-43) average. Growing conditions for the second

season in succession were decidedly unfavorable. The French authorities point out that these estimates are for "commercialized" oil only and that annually an unknown quantity is produced by natives, on which no statistical data can be obtained.

Roughly 92 percent of the French Moroccan olive acreage is owned by natives and 8 percent by Europeans. The trees owned by Europeans generally are better taken care of and produce a better yield of fruit. On the basis of acreage owned, the percentage of oil produced by Europeans that enters legal commercial channels (commercialized) is considerably higher than of that produced by natives.

The consumption of edible oil in French Morocco is relatively high. As in Algeria, domestic production of all types of oil is insufficient to cover domestic requirements. A considerable quantity of peanut, soybean, and other oils was imported each year before the war. There was, however, an export trade in olive oil, since the relatively expensive olive oil could be sold abroad at a profit while the less expensive oils were imported for domestic consumption.

The lack of sufficient imported oils since the outbreak of the war has resulted in severe shortages. The Protectorate Government has approached the problem, both from a short- and a long-range point of view, with varying degrees of success. The production of linseed, sunflower-seed, and cottonseed oils was stimulated by a decree in 1942 making it mandatory that 10 percent of cultivated land be planted to these oil-seed crops. This scheme for a short-term increase is still in operation and has been reasonably successful.

The long-term plan involves extensive planting of olive trees. A program has been set up by the Director of Economic Affairs which envisions planting 15 million olive trees during the next 15 years and the erection of a modern pressing plant for each 100,000 trees (about 1,000 to 1,500 hectares or 2,471 to 3,706 acres). Completion of the proposed new planting program would mean three times the number of trees now estimated as being in bearing in the Protectorate. The average length of time from

planting to commercial bearing is estimated to be 10 years. The full impact of the program, therefore, would not be noticed on the market until 1960.

It is proposed that plantations be set out by individuals, groups of farmers, syndicates, native religious foundations, and even by the Protectorate Government itself. At present, plans are being studied for the payment of bonuses to encourage plantings. The plan also provides for reeducating the Arab farmer on cultural methods insofar as they relate to olives. According to Protectorate authorities, the first step will be an extensive pruning program to be undertaken this year for the purpose of putting the groves in better condition.

A sales office, possibly based on the Office des Huiles Tunisien pattern, is to be established at a later date. Moroccan exporters state that olive oil from that country has always been favorably received in Italy, France, the United States, and Uruguay. A control office would protect local oils against imports and insure their sale on foreign markets. The increasing population no doubt will absorb a considerable proportion of any increased production resulting from the new planting; however, no relief from the acute oil shortage can be anticipated from this plan in the near future.

The 1944-45 preliminary estimate for edible olive-oil production in Tunisia has been revised downward to 90,000 tons compared with 38,500 in 1943-44 and 55,000 tons in 1942-43. This estimate, a record high, is 120 percent larger than the 5-year (1938-39 to 1942-43) average and 90 percent larger than the 10-year (1933-34 to 1942-43) average. The estimates refer to oil entering legal commercial channels and do not include that consumed by natives on farms or the quantity entering black markets.

At the beginning of the season a serious shortage of storage facilities existed. Since then, however, considerable progress has been made to remedy the situation. Salvaged drums held by military authorities and new drums from Egypt have been released. The critical storage problem is now largely solved.

A new problem has arisen that may result in a slightly lower production entering commercial channels than indicated above. The prices fixed for oil by the Tunisian Government are said to be too low, while the cost of labor is too high, making the whole deal less remunerative. It is significant that by early in February a considerable

portion of the olives remained to be harvested. It is rumored that clandestine pressing, hoarding, sales, and even exports are increasing at alarming rates because of the price situation. Legal exports to Algeria, Morocco, and France have been made as anticipated at the beginning of the season.

W. R. Schreiber

BRITAIN'S MILK SUPPLY CONTINUES TO INCREASE

The supply of milk in England and Wales for the winter months just past averaged about 2 percent above that for a year earlier. This continues the upward rise in supplies that has been in progress from the wartime low occurring in December 1941. The supplies in December, 1944 reached 900 million pounds compared to 866 million in 1943, 752 million in 1941, and 791 million for the average December supplies in the 3 pre-war years 1937-1939. Thus, an increase is shown in December 1944 supplies of 13.8 percent from pre-war and 19.7 percent from the low point in 1941. January 1945 supplies were 917 million pounds as compared to 896 million in 1944 and 790 million for the same pre-war years. For the 28 days in February 1945, supplies were 973 million pounds in Great Britain, as compared with 971 million for the 29 days in February 1944. This represents a 3.8-percent increase in average daily supplies.

The result of the Governmental wartime program, which has given milk first place among all foodstuffs because of its value as a protective food, is further apparent from the table below. Sales of milk in liquid form in England and Wales show a steady increase from the beginning of the war. Such sales in 1943-44 show a 36.7-percent increase over 1938-39 and represent 88.8 percent of total supplies, as compared with only 68.5 percent in the earlier years. This use of a larger portion of milk in its natural form assures greater benefits of the protective value of this food. A corresponding decrease is shown in the quantities diverted to manufactured dairy products.

ENGLAND AND WALES: Sales and utilization of milk through Milk Marketing Board, 1943-44 with comparisons

YEAR	LIQUID	MANU-	TOTAL
OCTOBER-SEPTEMBER:	SALES	FACTURED:	SALES
	: Million:	: Million:	: Million
	: pounds	: pounds	: pounds
1938-39	7,898	3,625	11,523
1939-40	8,124	2,904	11,028
1940-41	9,541	1,222	10,763
1941-42	10,006	1,109	11,115
1942-43	10,477	1,317	11,794
1943-44	10,800	1,365	12,165

Official sources.

Winter supplies of milk have been increased along with total supplies, so that the benefits of milk have been well realized in the more critical food months. The good seasonal distribution of supplies, together with the greater quantities utilized in the natural form, is given considerable credit in the maintenance of the health of the population. Also, the higher sale value in this form has helped the Ministry of Food and the Milk Marketing Board in returning a good price to producers and in supplying milk to children for a nominal price.

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YEAR	WINTER	SUMMER	YEAR
OCTOBER-SEPTEMBER:			
	: Million:	: Million:	: Million
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1938-39	5,016	6,507	11,523
1939-40	4,912	6,116	11,028
1940-41	4,804	5,959	10,763
1941-42	4,750	6,366	11,116
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Official sources.

Weekly liquid milk sales in early December 1944 reached 201 million pounds and

represented an increase of 8.5 percent above comparable figures for a year earlier. Of these weekly liquid sales, 51.5 percent, or 104 million pounds, went to priority classes of consumers. The breakdown among classes shows 32 million pounds for the allowance of 2 pints a week to all priority persons, plus 49 million pounds for additional priority allowance to individuals, and 23 million to priority establishments, schools, and hospitals. Further division of allowance to individuals shows 65 million pounds to infants and adolescents, 9 million to invalids against medical certificates, and 7 million for expectant mothers and mothers of infants under 1 year of age.

Allocations to all priority classes have increased since September 1943. The increase was 9.6 percent to infants and adolescents, 57 percent to expectant mothers and mothers of young babies, 29 percent on medical certificates, and 10.3 percent to priority establishments. The increase for infants and adolescents has been due in part to a rise in birth rate, and in part to inclusions of more adolescents in this priority class. The increase for mothers is due to the rise in birth rate, plus a simplification in the procedure for obtaining the priority.

LATE REGIONAL DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

ARGENTINE CORN ACREAGE REVISED

The Argentine corn acreage planted for the current harvest is placed at 12,147,000 acres, according to the latest estimate. That figure is considerably larger than the first estimate of 9,889,000 acres and the 1943 plantings of 10,903,000 acres. It is, however, still less than 90 percent of the average of 13,700,000 acres for the 5 years ended with 1942.

As a result of severe drought damage, losses are reported to be heavy, especially in Northern areas, and the abandonment is expected to be above average. Abandoned acreage of corn averaged around 30 percent for the 10 years ended with 1942.

The nonpriority sales of 91 million pounds subdivides to 71 million pounds to domestic consumers and 20 million to establishments. About 6 million pounds go as "marginal allowance" to dairymen to be used for holders of emergency ration cards.

Another feature of the wartime distribution of milk shows that in certain industrial areas that suffered severely from the depression, consumption of liquid milk per person has increased four times since 1935. On the other hand, per capita consumption in some residential areas has decreased because of rationing. Thus, the wartime program has brought adjustments in the form of consumption, in the distribution to categories of consumers within areas, and as between areas of the country.

The reduced quantities of milk diverted to manufactured dairy products have been largely compensated by imports, especially in the case of cheese and nonfat milk solids. The imports, together with maintenance of production for fluid consumption, have made it possible to increase by more than 25 percent the total per capita civilian intake of dairy products, exclusive of butter. Supplies of butter, however, have been cut to less than one-third pre-war quantities.

*Based on reports from
the United Kingdom.*

BRAZIL SUSPENDS EXPORTS OF CORN AND MANIOC FLOUR

The Brazilian Government has announced a temporary suspension of exports of corn and manioc flour. The measure was said to be taken to assure the country's food supplies. The prohibition against exports was announced for a 6-month period, during which time an analysis of existing stocks may be made. The order may be rescinded within that period if supplies justify such action.

CROP CONDITION FAVORABLE IN UNITED KINGDOM

Weather conditions in the United Kingdom were seasonable, and field work was progressing actively in late March, according to recent reports. Winter wheat had

come through the severe weather of January in generally good condition, and late sowings showed improvement during the mild weather of the latter half of February. Increased spring sowings were planned to make up arrears in the winter acreage sown. Winter rye and oats were also reported to be in good condition in most areas, having suffered little frost damage.

COTTON AND OTHER FIBERS

LARGER COTTON CROP EXPECTED IN EGYPT

Early reports indicate that Egyptian cotton growers will take full advantage of the Government's authorization to increase cotton acreage by nearly 25 percent in 1945. The area actually planted in 1944, as estimated by the Government, exceeded by 20 percent the 740,000 acres authorized by law. The increase in authorized acreage for 1945 therefore amounts to only 4 or 5 percent above last year's planted area.

A report on sales of seed for planting this year indicates that the 1945 acreage will be at least 5 percent larger than in 1944. It also indicates that Karnak will be the leading variety, Zagora will be cultivated on a small scale, and Menufi and Amon will be planted on a larger scale, mostly in place of Maarad. Menufi is reported by some spinners as being capable of replacing Giza 7.

Planting was begun in scattered areas in February, and preparation of soil was completed in most other areas by March 1. Supplies of water for irrigation were normal for that time of year and no shortage was anticipated. Labor is adequate, but farm implements and fuel for tractors are scarce and high in price, and supplies of chemical fertilizers are insufficient.

Exports during the 5 months ended February 28, 1945, were equivalent to 311,000 bales (of 478 pounds net) compared with 510,000 for the corresponding period a year ago. Domestic consumption of 96,000 bales during the 5-month period in 1944-45 is slightly higher than the 87,000 bales consumed last year.

Cotton prices rose by 50 to 110 piasters per cantar (0.41 to 0.91 cent per pound) in February as a result of stronger demand from liberated and neutral countries of Europe. Regular purchases, mostly Giza 7, are still being made by the Cotton Coordinating Committee, a Government buying agency.

INCREASED COTTON CONSUMPTION PLANNED IN BRAZIL

Brazil now is making plans for increased home consumption of cotton in order to reduce its dependence on world market outlets for its large cotton crops. Consumption of cotton in Brazil is reported to be running currently at the equivalent of about 900,000 to 950,000 American bales a year.

Reports indicate that the present spinning capacity of the Brazilian textile industry, estimated at slightly more than 3 million spindles, is to be doubled and perhaps even tripled. Officials of the industry are reported as believing that most of the United States textile-machinery production will be used to reequip mills in the United States and to replace machinery destroyed by the war in European countries, and that little equipment will be available for shipment to Latin America. For that reason, plans are being laid to make spinning equipment, looms, and cards in Brazil.

Some manufacturers are reported to be contacting United States machinery manufacturers with a view to obtaining technical assistance and heavy machinery so as to be able to begin operations in the near future. They hope to make the less complicated parts in Brazil and to buy the others either from United States or European manufacturers. The finished machinery would be assembled in Brazil.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted to United States currency at current rates of exchange.

COTTON: Price of certain foreign growths
and qualities in specified markets

MARKET LOCATION, KIND, AND QUALITY	DATE: 1945:	PRICE PER POUND
		Cents
Alexandria (spot)	:	:
Ashmouni, F.G.F.	3-14:	30.06
Giza 7, F.G.F.	3-14:	32.99
Karnak, F.G.F.	3-14:	32.36
Bombay (March futures)	:	:
Jarila	3-16:	17.11
Bombay (spot)	:	:
Kampala, East African	3-16:	32.66
Buenos Aires (spot)	:	:
Type B	3-17:	14.59
Lima (spot)	:	:
Tanguis, Type 5	3-17:	15.32
Recife (spot)	:	:
Mata, Type 5	3-16:	12.68
Sertao, Type 5	3-16:	13.50
São Paulo (spot)	:	:
São Paulo, Type 5	3-16:	13.50
Torreón (spot)	:	:
Middling, 15/16"	3-17:	18.01

Compiled from weekly cables from representatives abroad.

**FLAX PRODUCTION INCREASES
IN RIO GRANDE DO SUL**

New areas were planted to flax in 1944 in the State of Rio Grande do Sul, Brazil, and a considerable increase in fiber production is expected. Production of flax straw in 1943 was approximately 8,380,000 pounds. Processing has not been completed for the 1943 crop, but the 1942 crop of 6,870,000 pounds of straw yielded about 1,480,000 pounds of fiber.

**RIO GRANDE DO SUL: Flax area and
production, 1939-1943**

YEAR	AREA a/ 1,000 acres	PRODUCTION OF FLAX STRAW 1,000 pounds
1939	66	600
1940	52	5,450
1941	55	7,590
1942	57	6,870
1943	60	8,380

Compiled from consular report.
a/ Includes area for seed.

Very little flax fiber was produced in Brazil before the war. Small amounts are now harvested in the States of Parana, Santa Catharina, and Rio Grande do Sul, where flax has been grown for seed for many years. The Parana crop harvested in 1943 was expected to yield enough processed fiber to exceed local consumption by a small amount.

Recent experimentation has been made by the Federal Minister of Supply, with the aim of developing varieties that will produce a better quality of fiber. Domestic flax is not as fine as the imported variety, but it is now used by the clothing industry for mixture with such other domestic fibers as cotton, ramie, and caroa. Although production of pure linen piecegoods in Brazil rose from less than 400,000 yards in 1925 to nearly 9,000,000 yards in 1939, the mills depended entirely on imports for their supply of flax fiber. Since wartime curtailment of shipping has restricted the supply of imports, domestic fibers have been used wherever possible.

**CHILEAN HEMP ACREAGE DECREASES FURTHER
AS FLAX AREA INCREASES**

Hemp acreage in Chile during 1944-45 is reported in the second official estimate at about 11,200 acres, compared with 12,700 during the preceding year and 50,300 in 1942-43. Acreage increased gradually under favorable wartime conditions from about 12,500 acres in 1939-40 to the peak in 1942-43. A sharp reduction, principally in the more recently developed flax lands south of Aconcagua and Valparaíso, followed a decrease in price immediately preceding the 1943 planting season.

The first official estimate of the 1944-45 flax acreage, for both seed and fiber, in Chile is about 16,000 acres or 25 percent more than the area of 1943-44. The Province of Iñares where flax is grown principally for fiber shows an increase from 1,300 acres to nearly 2,650, or about 100 percent. Exact fiber acreage cannot be determined. Chilean statistics do not show the separation. Local consumption during the past year was about 3,300 pounds of yarn and 6,600 pounds of flax thread. Exports of

flax that year went chiefly to Argentina, Brazil, and the United States, and included approximately 764,000 pounds, divided about equally between fiber and tow and the factory output of yarn and thread.

FRUITS, VEGETABLES, AND NUTS

MEXICAN BANANA EXPORTS LIKELY TO BE LOWER

Exports of bananas from Mexico for 1945 are likely to be below the 5,580,000 bunches exported in 1944. Exports in 1944 were 19 percent under those of 1943. This decrease is not attributed to a decrease in production but rather to difficulties in transportation. Banana plantings actually have been increased. Tabasco, until sigatoka first appeared in 1937, was the leading producing State. That State at present is able to ship by water most of the bananas it produces. Veracruz and Chiapas, the leading producing States at the present time, depend on rail transportation for moving the crop. The shortage of cars, particularly refrigerator cars, has created a bad situation for producers in those States. Losses are large, and many growers refuse to cut their fruit unless cars are at hand.

AUSTRALIAN CANNED FRUIT PRODUCTION LOWER

A preliminary estimate places the 1945 Australian pack of canned apricots, peaches, and pears at about the same as in 1944 when it totaled 2,308,000 cases of 2 dozen No. 2-1/2 cans. For pineapples, estimates are available only for the 1945 summer pack in Queensland, which is placed at 76,800 cases, an increase of 45 percent over the 1944 summer pack of 52,800 cases. Canned pineapple is produced only in Queensland. Victoria produces two-thirds of the total pack of other canned fruits. New South Wales rates second in importance as a producer.

There is an acute shortage of labor for canneries, and women are being taken from low priority employment to work in the plants. Prior to the war, about 60 percent of Australia's canned fruit was exported.

Of these exports, about 85 percent went to the United Kingdom and the remainder to Canada, New Zealand, and the Far East. During 1940 and 1941, exports increased to the East, principally for use by the military forces. Since 1942, the heavy Service demands for canned fruit within Australia have virtually ruled out commercial shipments.

Exports in 1943 and 1944 were prohibited except with the approval of the Commonwealth Government. In 1943, 56,000 cases were shipped to New Zealand. During 1944, the British Government's quota was 100,000 cases, all of which were dispatched to a war zone; New Zealand's allotment was 60,000 cases, and 15,000 cases were set aside to supply Pacific Islands adjacent to Australia.

FRUIT, CANNED: Production in Australia, 1944 with comparisons

COMMODITY	: AVERAGE :				
	: 1936- : 1941: 1942: 1943: 1944				
	: 1940 :	:	:	:	:
	: 1,000 : 1,000: 1,000: 1,000: 1,000				
	: cases : cases: cases: cases: cases				
Apricots:	313: 288: 182: 216: 328				
Peaches	1,477: 1,660: 1,348: 1,158: 1,378				
Pears	785: 785: 595: 709: 602				
Total above :	2,575: 2,733: 2,125: 2,083: 2,308				
Pineapples ..:	317: 361: 225: 373: 101				
Total	2,892: 3,094: 2,350: 2,456: 2,409				

Official sources. In cases of 2 dozen No. 2-1/2 cans.

PRODUCTION OF WINE IN NORTH AFRICA INCREASED

Tunisian production of wine for 1945, estimated on the basis of present productive areas and under favorable conditions, probably will not exceed 21,000,000 gallons. Production for 1944 is officially estimated at 10,857,000 gallons, or 3 percent more than the 1943 production of 10,566,000 gallons, but only 26.8 percent of the 10-year (1930-1939) average of 38,000,000 gallons. Vineyards, especially those in the Cap Bon region, suffered extensive damage from military operations during Axis occupation. Yield in 1944 was adversely affected by

disease, drought, and hail damage in some northern sections. War conditions have made it hard to secure spray materials for vines. Present consumption is estimated at 9,246,000 gallons. Hence, exports, intended principally for France, will be small.

Production of wine in Algeria for 1944 is estimated at 244,670,000 gallons, an increase of 42 percent over the 1943 production of 172,708,000 gallons. Besides the current production of 244,670,000 gallons, some 124,517,000 gallons from the 1943 crop are still left in the wineries. Commercial stocks are placed at 38,146,000 gallons. All of this is to be disposed of before the 1945 production becomes available. Consumption is estimated at 97,743,000 gallons and exports at 29,059,000 gallons, leaving a surplus of 280,531,000 gallons. In normal times, exports averaged 266,000,000 gallons per year. Because of the magnitude of the surplus, the Government has ordered the distillation of 66,000,000 gallons.

CORRECTION

In the two tables on page 111 of the March 5 issue, the figures do not correspond with the headings in the boxes. Production figures are in the last column, and each of the other headings should be moved one column to the left to place them over the figures to which they pertain. The tables are repeated below, with the proper box heading over each column of figures.

PINEAPPLES: Production in Cuba, 1944 with comparisons

YEAR	EXPORTS			CON-	PRO-
	FRESH	CANNED	BRINED	SUMP-	DUC-
				TION	TION
1937-1940:	1,000:	1,000:	1,000:	1,000:	1,000
	crates	crates	crates	crates	crates
average:	1,172:	594:	24:	448:	2,238
1941:	979:	860:	36:	481:	2,345
1942:	439:	1,329:	54:	456:	2,278
1943:	630:	1,832:	26:	622:	3,110
1944 a/ ..:	766:	314:	19:	275:	1,374

Compiled from official sources. Converted to crates of fresh fruit as follows: Fresh 80 pounds; canned 2-1/2 crates of fresh per case of 41 pounds; brined, crates of 66 pounds. Consumption is estimated at 25 percent of exports.
a/ First 6 months only.

TOMATOES: Production in Cuba

January-June 1944, with comparisons

YEAR	EXPORTS		CONSUMPTION		PRO-
	FRESH	CANNED	FRESH	CANNED	DUC-
			a/	b/	TION
1937-1940:	Short:	Short:	Short:	Short:	Short:
	tons	tons	tons	tons	tons
average:	24,574:	47:	2,000:	5,901:	32,522
1941:	23,697:	125:	2,000:	6,896:	32,718
1942:	11,159:	65:	2,000:	12,056:	25,280
1943:	3,284:	317:	2,000:	5,322:	10,923
1944 c/ ..:	9,453:	3:	1,000:	5,165:	15,621

Compiled from official statistics. Gross weights of fresh and canned tomato products without conversion or allowance for waste.
a/ Small summer tomatoes used in cooking.
b/ Estimated from reports of principal can manufacturers and canned-tomato producers.
Cases of 41 pounds. c/ First 6 months only.

LIVESTOCK AND ANIMAL PRODUCTS

DANISH CATTLE INCREASE PROBABLY CHECKED BY SMALLER 1944 FEED CROPS AND HIGHER PRICES

The upward tendency in Danish cattle numbers, noticed since early 1943, may be checked this year by the smaller 1944 feed crops and the higher prices of feed grains. Numbers continued to increase in 1944, although the increase was not as large as 1943.

The total number of cattle reported on hand as of December 30, 1944, was 3,036,000, an increase of 4 percent above the estimate for the preceding January. Numbers at that time were only 5 percent below the high level reached in December 1939. The increase was fairly general, as cows and heifers that had calved showed an increase of 4 percent during 1944 and other cows and heifers 3 percent. The increase in calves under one year was also 3 percent. Bulls and oxen of one year and over decreased.

There was a seasonal reduction in total cattle numbers in the last half of the year of about 101,000 head, or 3 percent, as compared with July 1944 figures. In the 5 pre-war years, 1935-1939, the end-of-year estimates showed a reduction of one percent compared with the July estimates, on the average, whereas in 1940, the year of the invasion, the percentage decrease during the last half of the year was 8 percent. Since then, it has ranged from 5 percent in 1941 to 3 percent in 1943 and 1944.

MOROCCAN LIVESTOCK SUFFER WORSE WINTER SETBACK THAN USUAL

Heavy rains in mid-January have not as yet alleviated the condition of Moroccan livestock, which have suffered first from drought in the early winter and later from cold and lack of feed. The cold has been too intense to permit the growth of grass, and pasture lands in the interior of the country are still barren. The high death rate of cattle and sheep has not declined, and losses among young, new-born animals are heavy, due to the fact that dams cannot furnish sufficient milk for lack of green forage. Because of limited rations of grain and straw, work animals have not been in good enough condition to permit the completion of the agricultural plan for 1945.

DENMARK: End-of-year estimates of cattle numbers, 1939, 1941-1944

CLASSIFICATION:	END OF YEAR ^{a/}				
	1939:	1941:	1942:	1943:	1944
	: 1,000:	1,000:	1,000:	1,000:	1,000
	: head,	head,	head,	head,	head
Bulls 1 year	:	:	:	:	:
and over ...	67:	53:	49:	53:	51
Oxen 1 year	:	:	:	:	:
and over ...	64:	59:	53:	54:	53
Cows & heifers:	:	:	:	:	:
Have calved	: 1,618:	1,403:	1,385:	1,469:	1,532
Not calved ..	587:	558:	545:	565:	581
Calves under	:	:	:	:	:
1 year	: 850:	760:	728:	792:	819
Total	: 3,186:	2,833:	2,760:	2,933:	3,036
	:	:	:	:	:

Compiled from reports received in Office of Foreign Agricultural Relations.
^{a/} Estimates for end of December or early January of following year.

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